Georgia Technology Authority

Internal Program Management Office

New Program or Initiative

Business Case

Instructions

[Project Name]

New Program/Initiative Business Case TemplateVersion:	3.1
Effective Date:	July 19, 2005

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1.0   Business Case Identification:

Project Name:

The name should be a concise, descriptive name by which to identify this project. This name will be copied from the PIR.

Tracking Number (copy from PIR):

This is the identification number by which the Business Case will be known. This value will be copied from the PIR that was approved that allowed the development of the Business Case.

Submission Date:

The date on which the Business Case was submitted to the representative in the Portfolio Support Team (PST) and the representative agrees that the Business Case is ready for review by the Governance Team. Given that the PST provides support/ coaching for the Business Owner, this is a single date.

Project Owning Division/Office:

The full name of the entity and Division/ Office that owns the project.

Business Owner:

The individual who submits the formal request for the project and who is the primary advocate for the project. The individual must be at the Director level or one of their direct reports. This field is a drop-down list box containing all appropriate individuals. If a name is missing from the list, please contact the Internal Planning and Performance Management Director.

Executive Sponsor:

The individual at the executive level who is the primary sponsor of the project. This field is a drop-down list box containing all appropriate individuals. If a name is missing from the list, please contact the Internal Planning and Performance Management Director.

Total Project Cost:

This is the total cost identified for the project. It includes both Development as well as Operations costs for 5 years. Copy the amount from the 'Total' row in 'Section 5. Recommended Solution – Summary of Financial Information – Costs'.

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Project Priority:

This is the priority identified for the project. It is the result of completing the Project/Portfolio Prioritization Scoring Sheet. Copy the "Project Priority" (High, Medium, or Low) from the scoring sheet, Appendix E.

Business Case Point of Contact (POC*):*

These are the personnel who are actively involved in writing the business case. The information on the first row of the table should be the POC within the Business Owner's organization and the second row should be the GTA Budget Analyst reviewing the business case. The other individuals listed may be from the same organization or other organizations depending upon the extensiveness of the impact of this project. The individuals listed could also be contractors/consultants as necessary. Add additional rows as necessary.

Name	Phone Number	Email address

2.0   Executive Summary:

This is a summary of the information contained within the Business Case and should be no more than half a page. Consider this to be "the elevator conversation" for the Business Case.

This section should consist of:

- *Summarizing the information contained within Section "3. Business Need/Problem" into one paragraph*

- *Summarizing the information contained within Section "4. Project Objectives" into one paragraph*

- *Copying the "Description" from Section "5. Recommendation Solution"*

- *Total the cost in dollars of the project (Development and 5 years of Operations) from Section "5. Recommendation Solution"*

- *Total the tangible benefit dollars of the project from Section "5. Recommendation Solution"*

- *Copying the "Anticipated Project Start Date" of the project from Section "5. Recommendation Solution"*

- *Copying the "Estimated Implementation Timeframe" of the project from Section "5. Recommendation Solution"*

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3.0 Business Need/Problem:

The information for this section should initially be copied from the PIR.

Business needs may be expressed in terms of deficiencies in existing capabilities, new or changed program requirements, or opportunities for economies or efficiencies

When this section is completed, the following question should be answered: "Is the need for the investment clear?"

This section focuses on answering three main questions: (1) What is the current environment, both internal and external, in which the business/function is operating? (2) How and why must the business respond strategically to this need/problem? (3) What are the key opportunities for creating value, and how must the business change to take advantage of these opportunities?

Discuss the context needed to define the value creation opportunities and strategic imperatives for change. Possible areas to be considered:

- *Market attributes and trends (review current GTA statistics, research industry best practices and trends, research using industry analysis reports, research other states, etc.)*
- *Value chain (be sure to consider the 'broad picture' to better understand the <u>strategic</u> importance of the project)*
- *Willingness to change (are the groups that are affected by the change willing and able to accommodate the necessary changes, will the required changes have impact to other areas)*
- *Other environmental Influences*
  - *Political (identify the group that is requesting this project)*
  - *Regulatory (identify the specific mandate)*
  - *Economic (is the current approach costing too much compared to the benefits received)*
  - *Technological (is the technology outdated)*
  - *Social (who are the customers that are impacted by this and are they internal or external)*

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4.0   Project Objectives:

The information for this section should initially be copied from the PIR.

This section will contain the expected end result of the project. The objectives should be at a mid-level of detail. The objectives do not need to be at the 'deliverable' level of detail. However, if they are too high, there is not enough information to properly understand the expected outcomes of the project.

When this section is completed, the following questions should be answered: "What will this investment buy?" and "How does this project support GTA's mission, vision, and strategies?"

The objectives should be in well defined bulleted format. In many cases there should be objectives related to each of the following:

- *People (knowledge/skills that individuals should have once the project is complete, role descriptions that may need to change, new positions that may be required, etc.)*

- *Processes (changed/ new documented processes and procedures for personnel and automation, methods for capturing statistics for measuring benefits/costs, etc.)*

- *Technology (updated or new hardware/ software, updated architecture, documentation required for the updated/new technology, etc.)*

- *Communication (between other projects, with stakeholder both internal and external, etc.)*

5.0   Recommended Solution:

When this section is completed, the following question should be answered: "Is the basis for selection of the chosen alternative reasonable?"

Description:

This is a brief description of the recommended solution. The description should contain a reference to something like one of the following: enhance existing solutions, implement a package solution, implement a custom developed solution, etc.

Scope:

This is a description of what is included within the project. It is not just a restatement of the information contained within Section "4. Project Objectives" or the information contained within the "Approach" field below.

When discussing the scope, be sure to include "what it is not". This will help to ensure that reviewers are not "reading more into the project" than what is intended by the Business Owner.

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Approach:

This will describe the manner in which the Business Owner intends to accomplish the project. Items to be documented within this field include:

- *Phases (Will the project be segmented into phases? If so, describe each phase.)*

- *For each phase (or the project overall if there are no phases), identify and describe the high level tasks that will be completed (conducting focus groups to obtain business requirements, conducting other sessions to obtain technical requirements, reviewing requirements, developing conceptual designs for parts of the architecture, developing the solution, different testing levels for the solution, training, communicating with stakeholders, etc.)*

Impact:

The information for this section should initially be copied from the PIR.

Given the specific solution, more detailed impacts should now be identified and described.

Impacts should be categorized by:

- *People*

- *Processes*

- *Technology*

Within each of the categories, further define the type of impact. For example, within the "People" category there may be impact types of:

- *New skills required of existing personnel*

- *Role description changes*

- *New positions required*

- *Positions removed*

- *Cultural changes to the organization*

For each impact type, further describe the impact and how the project will attempt to mitigate the affect of the impact. Examples of "Mitigation Approaches" include:

- *On the job training with the vendor by "pairing" an internal resource with the vendor resource on each task*

- *Knowledge transfer training sessions conducted by the vendor*

- *Third party training classes*

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NOTE: For some solutions, detailing some impacted areas may be difficult at this time. For example, the project may require a Statement of Need (SON) or a Request for Proposal (RFP). The detailed impact will depend upon the selected vendor's approach. In these cases, the Business Owner should do his/her best in detailing the impact based upon his research on potential solutions. The Business Owner should also make sure that the SON or RFP contains tasks for the vendor to help ensure that the impact will be mitigated.

Impacted Category and Type of Impact	Impact Description	Mitigation Approach

Anticipated Project Start Date:

The information for this field should initially be copied from the PIR and updated here as necessary.

The business case should be completed well in advance of a project's start date. If the project's anticipated start date is less than 3 months away, then the Business Owner will need to explain the "urgency" of the request.

Estimated Implementation Timeframe:

The information for this field should initially be copied from the PIR and updated here as necessary.

Timeline/Project Schedule:

The information in this table should be very high level. The duration in the table should be changed to reflect the highest duration in the project. For example, if the project duration is weeks (less than 4 months) then the table should be changed to reflect weeks. Likewise, if the project duration is several years than change duration to reflect years. Make sure that the timeline information agrees with the Anticipated Project Start and the Estimated Implementation Timeframe fields.

Resource	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6

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Milestones
Identify the major milestones and deliverables and their associated timeframe.

#	Milestone	Start Date	End Date

Constraints:
Identify any factors that will (or do) limit the project management team's options. Contract provisions are usually considered constraints.

Assumptions:
Planning factors that, for planning purposes, will be considered true, real, or certain. Assumptions generally involve a degree of risk. Any assumptions related to the solution should be documented here unless they relate to Benefits or Cost. Those assumptions are documented specifically with their category.

Benefits Description:

Tangible Benefits*:*
An item is "tangible" if it can be expressed as a quantity and can then be translated into a dollar impact. These are also known as "hard dollar" benefits. These are benefits that can be assigned a dollar value and that dollar value is of direct benefit to GTA.

Each benefit should be identified on its own line. For each benefit, identify the method for measuring the benefit, the current value based upon the measurement, the expected value based upon the measurement, and when the benefit will be realized. Some benefits may be achievable immediately upon implementation. Others may require personnel to become proficient on new processes before the full benefit may be realized.

Benefit	How to Measure	Current Value	Expected Value	When will Expected Occur

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Intangible Benefits:

An item is "intangible" under two conditions:

♣ *If it can NOT be expressed as a quantity. These are benefits that can NOT be assigned a dollar value. These are generally more related to "quality" such as "a customer satisfaction survey changing from a '3' to a '4'".*

♣ *If it can be expressed as a quantity and can then be translated into a dollar impact but these dollars are NOT direct benefits to GTA.*

Intangible benefits are also known as "soft dollar" benefits.

An example of dollars NOT directly benefiting GTA is: "reduction in customer wait time in line". The measurement would be "wait time in line". The current value may be "50 minutes". The expected wait time may be "20 minutes". It could be assumed that the average cost of our customer's time per minute is "$0.50" ($30.00 per hour). Because the dollar savings is in "customer's time" and not "GTA" time, this can only be listed as an "intangible" benefit to GTA.

As with the "tangible" benefits, each "intangible" benefit should be identified on its own line. For each benefit, identify the method for measuring the benefit, the current value based upon the measurement, the expected value based upon the measurement, and when the benefit will be realized. Some benefits may be achievable immediately upon implementation. Others may require personnel to become proficient on new processes before the full benefit may be realized.

Benefit	How to Measure	Current Value	Expected Value	When will Expected Occur

Benefits Assumptions:

Planning factors that for planning purposes will be considered true, real, or certain. Assumptions generally involve a degree of risk. Any assumptions related to the identified benefits should be documented here.

Summary of Financial Information:

This sub-section summarizes the dollars associated with the costs and benefits. Supporting summary information for the costs and benefits are located in the Excel Cost/Benefit Analysis Workbook identified in Appendix C - Cost/Benefit Analysis Workbook.

Costs Summary:

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Costs:

Refer to the tab entitled CostBenefitComparison in the Excel workbook entitled Cost/Benefit Analysis. For the alternative selected, copy the corresponding yearly numbers in the Development Costs row and the Operations Costs row.

As a reminder, any project whose Development Costs exceeds $1 million must include costs for Independent Verification & Validation (IV&V).

	Fiscal Year (FY)	FY +1	FY +2	FY +3	FY +4	FY +5	TOTAL
Development							
Operations							
Total							

Costs Assumptions:

Planning factors that for planning purposes will be considered true, real, or certain. Assumptions generally involve a degree of risk. Any assumptions related to the identified costs should be documented here.

Benefits Summary:

Benefits:

Refer to the tab entitled CostBenefitComparison in the Excel workbook entitled Cost/Benefit Analysis. For the alternative selected, copy the corresponding yearly numbers for the Total Projected Benefits row.

	Fiscal Year (FY)	FY +1	FY +2	FY +3	FY +4	FY +5	TOTAL
Total							

Benefits Assumptions:

Planning factors that for planning purposes will be considered true, real, or certain. Assumptions generally involve a degree of risk. Any assumptions related to the identified dollar value of the benefits should be documented here.

Net Benefit:

Refer to the tab entitled CostBenefitComparison in the Excel workbook entitled Cost/Benefit Analysis. At the top of the tab, for the alternative selected, copy the Net Benefit (Cost) value.

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Cost/Benefit Ratio*:*
Refer to the tab entitled CostBenefitComparison in the Excel workbook entitled Cost/Benefit Analysis. At the top of the tab, for the alternative selected, copy the Cost/Benefit Ratio value.

6.0   Risks/Critical Dependencies:

A "Risk" is an event or condition that may occur, causing a negative impact on the project.

A "Critical Dependency" is a relationship between two or more "things" (tasks, other projects, people, etc.) where the full or partial start or finish of one determines the start or finish of another.

Each Risk that may impact this project and each Critical Dependency upon which this project depends should be listed. The information for this field should initially be copied from the PIR.

For each Risk and Critical Dependency, identify the high level steps that will be used to mitigate the impact to this project.

7.0   Comments:

This section allows the Business Owner to enter any free-form additional comments related to the Business Case that are not documented elsewhere.

NOTE: Be careful not to include comments here that could be more appropriately placed (and worded) in the other previously identified sections.

8.0   Purchase Plans (If applicable):

This section allows the Business Owner to enter any free-form additional comments related to the procurement of any or all of the items necessary to support this Business Case.

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Appendix A – Approvals:

Owning Business:

The information related to the Director of the organization that is the primary supporter of the Business Case.

Director Name	Organization	Response (Approve, Reject, N/A)	Date	Signature

Executive Sponsor:

The individual at the executive level who is the primary sponsor of the project. This field is a drop-down list box containing all appropriate individuals. If a name is missing from the list, please contact the Internal Planning and Performance Management Director.

Director Name	Organization	Response (Approve, Reject, N/A)	Date	Signature

GTA Budget Analyst:

The information related to the Budget Analyst within GTA responsible for reviewing the business case prior to submittal for approval. The Budget Analyst must provide a response to "Approve", "Reject", or "N/A" (only use "N/A" if the Business Case does not impact the GTA).

Requiring the GTA Budget Analyst to sign the Business Case ensures that the version of the Business Case submitted for approval has been reviewed for budgetary impact.

Name	Response (Approve, Reject, N/A)	Date	Signature

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Supporting Businesses:

The information related to the Director of each of the other organizations within GTA. Each Director must provide a response to "Approve", "Reject", or "N/A" (only use "N/A" if the Business Case does not impact the Director's organization).

Requiring each Director to sign the Business Case ensures that each Director reads the Business Case and understands its impact to his/her organization.

Director Name	Organization	Response (Approve, Reject, N/A)	Date	Signature

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Appendix B – Alternative Approaches:

The information requested in this section is similar to the information requested in Section '5. Recommended Solution'. See the descriptions above for the corresponding fields.

Alternatives are not just different combinations of subsets of the recommended solution. Alternatives should be completely different approaches to satisfying the business need/problem. Some types of alternatives are: keep the status quo (the current situation), enhance existing solutions, implement a package solution, implement a custom developed solution, etc.

It is possible that some fields of the Alternative Approach could be the same as the Recommended Approach. If this is the case, then it is acceptable to place "Same as recommended approach" in the specific field. However, be cautious as the alternative approach may have some differences such as when costs will be incurred or benefits recognized. Some costs or benefits may not even be incurred/realized with the alternative solution.

Alternative Approach 1:

Description:

Scope:

Approach:

Impact:

Impacted Category and Type of Impact	Impact Description	Mitigation Approach

Anticipated Project Start Date:
Select the Month and Year from the respective drop down boxes that best reflect when the requested project will start.

Estimated Implementation Timeframe:
The information for this field should initially be copied from the PIR and updated here as necessary.

Timeline/Milestones/Project Schedule:
The information in this table should be very high level. The duration in the table should be changed to reflect the highest duration in the project. For example, if the project duration is weeks (less than 4 months) then the table should be changed to reflect weeks. Likewise, if the project duration is several years than change duration to reflect years. Make sure that the timeline information agrees with the Anticipated Project Start and the Estimated Implementation Timeframe fields.

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#	Milestone	Start Date	End Date

Constraints:

Identify any factors that will (or do) limit the project management team's options. Contract provisions are usually considered constraints.

Assumptions:

Planning factors that, for planning purposes, will be considered true, real, or certain. Assumptions generally involve a degree of risk. Any assumptions related to the solution should be documented here unless they relate to Benefits or Cost. Those assumptions are documented specifically with their category.

Benefits Description:

Tangible Benefits:

An item is "tangible" if it can be expressed as a quantity and can then be translated into a dollar impact. These are also known as "hard dollar" benefits. These are benefits that can be assigned a dollar value and that dollar value is of direct benefit to GTA.

Each benefit should be identified on its own line. For each benefit, identify the method for measuring the benefit, the current value based upon the measurement, the expected value based upon the measurement, and when the benefit will be realized. Some benefits may be achievable immediately upon implementation. Others may require personnel to become proficient on new processes before the full benefit may be realized.

Benefit	How to Measure	Current Value	Expected Value	When will Expected Occur

Intangible Benefits:

An item is "intangible" under two conditions:

* *If it can NOT be expressed as a quantity. These are benefits that can NOT be assigned a dollar value. These are generally more related to "quality" such as "a customer satisfaction survey changing from a '3' to a '4'".*

* *If it can be expressed as a quantity and can then be translated into a dollar impact but these dollars are NOT direct benefits to GTA.*

Intangible benefits are also known as "soft dollar" benefits.

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An example of dollars NOT directly benefiting GTA is: "reduction in customer wait time in line". The measurement would be "wait time in line". The current value may be "50 minutes". The expected wait time may be "20 minutes". It could be assumed that the average cost of our customer's time per minute is "$0.50" ($30.00 per hour). Because the dollar savings is in "customer's time" and not "GTA" time, this can only be listed as an "intangible" benefit to GTA.

As with the "tangible" benefits, each "intangible" benefit should be identified on its own line. For each benefit, identify the method for measuring the benefit, the current value based upon the measurement, the expected value based upon the measurement, and when the benefit will be realized. Some benefits may be achievable immediately upon implementation. Others may require personnel to become proficient on new processes before the full benefit may be realized.

Benefit	How to Measure	Current Value	Expected Value	When will Expected Occur

Benefits Assumptions:
Planning factors that for planning purposes will be considered true, real, or certain. Assumptions generally involve a degree of risk. Any assumptions related to the identified benefits should be documented here.

Summary of Financial Information

Costs Summary:

Costs:
Refer to the tab entitled CostBenefitComparison in the Excel workbook entitled Cost/Benefit Analysis. For the alternative selected, copy the corresponding yearly numbers in the Development Costs row and the Operations Costs row.

As a reminder, any project whose Development Costs exceeds $1 million must include costs for Independent Verification & Validation (IV&V).

	Fiscal Year (FY)	FY +1	FY +2	FY +3	FY +4	FY +5	TOTAL
Development							
Operations							
Total							

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Costs Assumptions:
Planning factors that for planning purposes will be considered true, real, or certain. Assumptions generally involve a degree of risk. Any assumptions related to the identified costs should be documented here.

Benefits Summary:

Benefits:

	Fiscal Year (FY)	FY +1	FY +2	FY +3	FY +4	FY +5	TOTAL
Total							

Benefits Assumptions:
Planning factors that for planning purposes will be considered true, real, or certain. Assumptions generally involve a degree of risk. Any assumptions related to the identified benefits should be documented here.

Net Benefit:
Refer to the tab entitled CostBenefitComparison in the Excel workbook entitled Cost/Benefit Analysis. At the top of the tab, for the alternative selected, copy the Net Benefit (Cost) value.

Cost/Benefit Ratio:
Refer to the tab entitled CostBenefitComparison in the Excel workbook entitled Cost/Benefit Analysis. At the top of the tab, for the alternative selected, copy the Cost/Benefit Ratio value.

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Alternative Approach 2:
  Description:

  Scope:

  Approach:

  Impact:

Impacted Category and Type of Impact	Impact Description	Mitigation Approach

Anticipated Project Start:
The information for this field should initially be copied from the PIR and updated here as necessary.

The business case should be completed well in advance of a project's start date. If the project's anticipated start date is less than 3 months away, then the Business Owner will need to explain the "urgency" of the request.

Estimated Implementation Timeframe:
The information for this field should initially be copied from the PIR and updated here as necessary.

Timeline/Milestones/Project Schedule*:*
The information in this table should be very high level. The duration in the table should be changed to reflect the highest duration in the project. For example, if the project duration is weeks (less than 4 months) then the table should be changed to reflect weeks. Likewise, if the project duration is several years than change duration to reflect years. Make sure that the timeline information agrees with the Anticipated Project Start and the Estimated Implementation Timeframe fields.

#	Milestone	Start Date	End Date

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Constraints:

Identify any factors that will (or do) limit the project management team's options. Contract provisions are usually considered constraints.

Assumptions:

Planning factors that, for planning purposes, will be considered true, real, or certain. Assumptions generally involve a degree of risk. Any assumptions related to the solution should be documented here unless they relate to Benefits or Cost. Those assumptions are documented specifically with their category.

Benefits Description:

Tangible Benefits*:*

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Each benefit should be identified on its own line. For each benefit, identify the method for measuring the benefit, the current value based upon the measurement, the expected value based upon the measurement, and when the benefit will be realized. Some benefits may be achievable immediately upon implementation. Others may require personnel to become proficient on new processes before the full benefit may be realized.

Benefit	How to Measure	Current Value	Expected Value	When will Expected Occur

Intangible Benefits:

An item is "intangible" under two conditions:

- *If it can NOT be expressed as a quantity. These are benefits that can NOT be assigned a dollar value. These are generally more related to "quality" such as "a customer satisfaction survey changing from a '3' to a '4'".*

- *If it can be expressed as a quantity and can then be translated into a dollar impact but these dollars are NOT direct benefits to GTA.*

Intangible benefits are also known as "soft dollar" benefits.

An example of dollars NOT directly benefiting GTA is: "reduction in customer wait time in line". The measurement would be "wait time in line". The current value may be "50 minutes". The expected wait time may be "20 minutes". It could be assumed that the average cost of our

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customer's time per minute is "$0.50" ($30.00 per hour). Because the dollar savings is in "customer's time" and not "GTA" time, this can only be listed as an "intangible" benefit to GTA.

As with the "tangible" benefits, each "intangible" benefit should be identified on its own line. For each benefit, identify the method for measuring the benefit, the current value based upon the measurement, the expected value based upon the measurement, and when the benefit will be realized. Some benefits may be achievable immediately upon implementation. Others may require personnel to become proficient on new processes before the full benefit may be realized.

Benefit	How to Measure	Current Value	Expected Value	When will Expected Occur

Benefits Assumptions:
Planning factors that for planning purposes will be considered true, real, or certain. Assumptions generally involve a degree of risk. Any assumptions related to the identified dollar value of the benefits should be documented here.

Summary of Financial Information

This sub-section summarizes the dollars associated with the costs and benefits. Supporting summary information for the costs and benefits are located in the Excel Cost/Benefit Analysis Workbook identified in Appendix C - Cost/Benefit Analysis Workbook.

Costs Summary:

Costs:
Refer to the tab entitled CostBenefitComparison in the Excel workbook entitled Cost/Benefit Analysis. For the alternative selected, copy the corresponding yearly numbers in the Development Costs row and the Operations Costs row.

As a reminder, any project whose Development Costs exceeds $1 million must include costs for Independent Verification & Validation (IV&V).

	Fiscal Year (FY)	FY +1	FY +2	FY +3	FY +4	FY +5	TOTAL
Development							
Operations							
Total							

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Costs Assumptions:

Planning factors that for planning purposes will be considered true, real, or certain. Assumptions generally involve a degree of risk. Any assumptions related to the identified costs should be documented here.

Benefits Summary:

Benefits:

	Fiscal Year (FY)	FY +1	FY +2	FY +3	FY +4	FY +5	TOTAL
Total							

Benefits Assumptions:

Planning factors that for planning purposes will be considered true, real, or certain. Assumptions generally involve a degree of risk. Any assumptions related to the identified benefits should be documented here.

Net Benefit:

Refer to the tab entitled CostBenefitComparison in the Excel workbook entitled Cost/Benefit Analysis. At the top of the tab, for the alternative selected, copy the Net Benefit (Cost) value.

Cost/Benefit Ratio:

Refer to the tab entitled CostBenefitComparison in the Excel workbook entitled Cost/Benefit Analysis. At the top of the tab, for the alternative selected, copy the Cost/Benefit Ratio value.

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Appendix C – Cost/Benefit Analysis Workbook

A print of each tab contained within the Cost/ Benefit Analysis Workbook. The information does NOT need to be 'cut and pasted' into the Word Business Case. The electronic Excel file will be sent along with the electronic Word file for the Business Case. A print of each tab will be included with the hard copy version of the Word Business Case.

As a reminder, any project whose Development Costs exceeds $1 million must include costs for Independent Verification & Validation (IV&V).

When this Appendix is completed, the following question should be answered: "Is there a clear set of costs and benefits as a baseline for measurement?"

For the hard copy of the business case, print each tab within the Excel Cost/Benefit Analysis workbook.

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Appendix D – Cost/Benefit Detail Workbook

This workbook contains the detail calculations used to arrive at the summary information included in Appendix C – Cost/ Benefit Analysis Workbook. The Business Owner should have this information available to answer questions but it is not required to be attached to the business case.

As a reminder, any project whose Development Costs exceeds $1 million must include costs for Independent Verification & Validation (IV&V).

This section is optional. If the Business Owner prefers to print the detail documentation for consideration during the Business Case review, it will be placed in this section.

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Appendix E – Project/Portfolio Prioritization Scoring Sheet

This workbook contains the instructions to complete the scoring sheet, the PMO prioritization criteria and the calculations to identify the Project Priority when the scoring sheet is completed. The Business Owner will attach the scoring sheet to the Business Case for reference during the approval process.

For the hard copy of the scoring sheet, print each tab within the Excel Project/Portfolio Prioritization Scoring Sheet workbook.